Red Flags Early On: How to Spot Risk Before It Spreads

Episode 5 Companion Download

Use this checklist to identify early warning signs of churn risk. The earlier you catch these signals, the more time you have to intervene and turn the account around.

The 6 Critical Red Flags

1. Engagement Drop-Off

Warning Signs:

- Email response time increases from hours to days
- Primary contact starts skipping regular check-ins
- Champion goes quiet on feature requests or roadmap discussions
- Junior team members attend meetings instead of decision-makers

What to Do:

- After 2 weeks of silence, reach out directly (don't wait longer)
- Use non-confrontational language: "I noticed we've missed a couple check-ins. Want to make sure we're still aligned."
- Escalate internally if pattern continues

2. Stakeholder Turnover

Warning Signs:

- Your champion or primary contact leaves the company
- Executive sponsor retires or moves to different role
- New stakeholder has no context on your relationship or value

What to Do:

- Within 24 hours: Ask departing stakeholder for intro to replacement
- Request handoff documentation from departing contact
- Within first week: Send welcome email with context and offer onboarding call
- Don't wait for new stakeholder to reach out - take ownership of relationship reset

3. Scope Creep Without Expansion

Warning Signs:

- Customer asks for features beyond original scope
- Requests more support, training, or customization - but no expansion talk
- Pushback when you mention pricing or upgrades
- Trying to extract maximum value before contract ends

What to Do:

- Ask directly: "Are we still aligned on what success looks like? It feels like goals may have shifted."
- Address the scope conversation early - don't let it compound
- Clarify what's in-scope vs. what requires expansion

4. Support Ticket Escalations

Warning Signs:

- Customer bypasses you and goes straight to support
- Issues escalate to leadership without coming through you first
- Customer doesn't trust you to solve problems anymore

What to Do:

- Own it: "I noticed this was escalated. That's my job to prevent. Let's talk about what happened."
- Diagnose why escalation happened (technical? communication gap? missed timeline?)
- Fix the process and communicate the fix
- Rebuild trust by over-communicating on every issue for a while

5. "We'll Circle Back" (But Never Do)

Warning Signs:

- Repeated "let's reconnect next week" with no follow-through
- Customer avoiding scheduling calls or meetings
- Polite deflection without actual commitment

What to Do:

- After 2nd "circle back," stop asking for permission
- Send calendar hold: "Blocking 30 minutes on your calendar for [date/time]. Let me know if that doesn't work."
- If they cancel or ignore, escalate internally - it's a relationship issue

6. "This Should Be Easier" Comments

Warning Signs:

- Offhand comments about difficulty or friction
- Comparisons to previous tools or competitors
- Frustration that's starting to compound

What to Do:

- Validate first - don't dismiss or defend
- "You're right - that should be easier. Let me look into workarounds or roadmap."
- Document feedback for product team
- Follow up to show you took it seriously

The 4-Step Response Framework

When you spot a red flag, follow this framework:

Step	Action
1. Name It	Call it out internally and (when appropriate) externally. Don't let it sit.
2. Diagnose It	Figure out the root cause. Product issue? Relationship issue? Priority shift? Ask questions.
3. Act On It	Build a plan and execute. Get-well plan? Stakeholder realignment? Product demo? Take action.
4. Communicate It	Keep your team and customer in the loop. Transparency builds trust.

Quick Action Checklist

- ☐ Monitor engagement patterns weekly (response times, meeting attendance, champion activity)
- ☐ Set up alerts for stakeholder changes in your accounts
- ☐ Track scope requests - flag when they exceed original agreement
- ☐ Review support ticket activity monthly for escalation patterns
- ☐ Document customer feedback (even casual comments) in CRM
- ☐ After spotting a red flag, escalate internally within 48 hours

Remember:

The cost of investigating a potential red flag is always lower than the cost of ignoring a real problem. When in doubt, name it, diagnose it, and act.